



PA 1.0 Create & Maintain Projects – 1.1 Create and Maintain Projects and Activities 1.1.9.1 Run 1.1.11.1 Run Custom Custom Inbound Outbound Interface from Interface to iPM SiteManager PA 2.2 1.1.12 Complete 1.1.8 Define/ 1.1.9 Define/ 1.1.10 Define/ 1.1.11 Define/ Define Project **Project Initiation Update Project** → Update DOT page **Update Project** End Update other ► Budget - KK Organization Information **Project Details** Status Checklist Assign project to a location, View steps required to set Enter chartfield values Select the project status Establish project Enter project information specify which project events up, initiate, and track a associated with each and assign an effective budget such as reporting require approval, who is project. Enter specific project. These values will date. Project status can be category, disaster number, authorized to approve the details about the required be used to build future effective dated. etc. events what order the events tasks for a project step. speedcharts & speedtypes must be approved, enter a Enter notes as the project for each project. reason for justifying a team progresses through project-related action, steps. Create new steps include additional userspecific to a project. defined project information or define budget alert thresholds at the project level.

PA 1.0 Create & Maintain Projects – 1.2 Create and Maintain Funds Distribution Rules 1.2.2 Define 1.2.3 Define 1.2.1 Establish **Project Costing** General Ledger 1.2.4 Define Start Source Criteria for and HR Criteria for Criteria for **Burdening Rules** D **Funds Distribution** for Source Rows Incoming Incoming **Transactions Transactions** Define incoming Establish rule by Further define criteria Define criteria for applying an transactions by selecting project and all activities additional charge or burden on for selecting incoming the analysis types and or by Project with a transactions by General selected incoming transactions other identifying information specified activity. Ledger COA such as prior to applying target rules. such as source type, fund, program, account, Ex. 12% charge for all PAY category, job code, analysis types. A row will be etc. employee ID to be used for added to the identifying transactions for PROJ_RESOURCE table the funds distribution rule. equivalent to 12% for each transaction. 1.2.8 Define 1.2.6 Define 1.2.5 Define 1.2.9 Activate the 1.2.7 Define **Project Costing** General Ledger ▶ Budget Check and Criteria for Target **Funds Distribution** End criteria for Target Criteria for Target **Row Sequences** Rule Reversal Rules Rows Rows Define the threshold Define the participation For each target row defined, Further define the amounts, start and end rates, analysis types, indicate whether a reversing criteria for the target dates for the sequence, description, activity, entry to adjust the source row rows by selecting description and status source type is needed and if the reversing General Ledger COA for the sequence. (appropriation code) transaction needs to be such as fund, program, and other project budget checked by clicking account, etc. accounting chartfields check box for each. to be applied to the Transaction will be reversed target rows. based on established

accounting rules.